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❖ Mandatory Field

Must enter Item Count or Quantity

+ Must enter Latitude and Longitude, Township/Range/Section, or UTM Coordinates.

@ The program enters ‘Not Provided’ if you do not complete this field.

VII. CATALOGING A PALEONTOLOGY SPECIMEN

A. Overview

1. *What types of specimens do I catalog as paleontology?*

Catalog extinct organisms, or their traces, often preserved in a mineralized form from a prior geologic era as paleontology.

2. *Where can I find information on cataloging?*

Refer to the *Museum Handbook*, Part II (*MH-II*), Chapter 3, Cataloging, or the *Museum Property Handbook*, Volume II (*MPH-II*), Chapter 3, Cataloging, for general information on cataloging specimens. Refer to your site-specific cataloging procedures, if available.

Refer to the *MH-II*, Appendix H, Natural History and *MPH-II* , Appendix N, Optional Data for Natural History, for additional information on cataloging natural history specimens.

3. *How many screens does a paleontology record have?*

The basic catalog record consists of five screens:

- registration (for basic collections accountability data)
- catalog (for descriptive data)
- collection site (for data on the collection site of the specimen)
- paleontology specialty (discipline-specific screen for descriptive data)
- unit (for unit-specific data that the user defines)

In addition, there are numerous supplemental record screens that can relate to the catalog record. Refer to Chapter 3, Supplemental Records.

4. *How will I know which data are mandatory?*

The instructions in this manual and the on-line help will indicate which fields are mandatory. If you do not enter data in a mandatory field, the program will do one of the following:

- not allow you to save the catalog record, *or*
- enter "Not Provided" in the field

5. *What if I have unverified data?*

It is important to distinguish between unverified data and documented fact. Use a question mark "?" or "(att)" for attributed, to indicate data that are probable but not certain.

6. *Do I have to complete every field?*

Not every specimen will be sufficiently documented to allow completion of all fields. If information is not known, leave the field blank.

7. *Must I enter information from the field label or field notes for the specimen exactly as it appears or is recorded?*

Yes. Recording information exactly as it appears on the field label or tag placed with the specimen by the researcher is necessary to maintain the scientific value of the specimen.

Note: You may correct misspellings of scientific names so that you are able to obtain a complete taxonomy through ITIS. See Section D for information on ITIS.

8. *How do I add to or change information on an existing catalog record?*

To modify a record:

- click on the modify icon on the button bar, *or*
- go to Edit on the menu bar and choose Modify This Record from the pull-down menu, *or*
- press the F10 key

A new window will open and you will see "Modify Mode" in the lower- right corner. You can then modify and save the record.

B. Adding a Paleontology Record

1. *How do I get to my natural history records?*

To access your natural history records:

- From the Home Page or Navigator, double-click on Collections, or expand the tree view for Collections by clicking the icon in front of it (if it is already expanded you will see the icon).
- At the Collection Directory Page (or under Collections in the tree view), double-click on the Natural History directory for your unit
- At the Natural History directory page, double-click on Catalog Records.

You should see the first record in your natural history database in the Record Pane on the lower right, or the record you were last viewing.

2. *How do I get to my paleontology records?*

To view all your paleontology records together:

- on the button bar, click on the Sort pull down menu By Class1-Discipline and select By Class 1-Discipline, *or*
- click on Record on the menu bar, go to Sort, and on the list of sorts select By Class 1-Discipline

The List Pane will change to show 'Class 1' in the first column. The program has sorted the natural history records by Class 1.

To see the paleontology records:

- click on any record in the Class 1 column of the List Pane and type "P", *or*
- click on the Find icon on the button bar and type "Paleontology" in the Find box

This will bring you to the Paleontology records. To view a record, click on the row in the List Pane and that record will appear in the Record Pane below.

3. *How do I add a paleontology record?*

To add a new record:

- click on the add icon on the button bar, *or*
- go to Edit on the menu bar and choose Add New Record from the pull-down menu, *or*
- press the F9 key

A new window opens. "Add Mode" is indicated in the lower right of the status bar. You can then add and save a record.

4. *How do I move through the record?*

Within the Field
Press the Home key to get to the beginning of a field or the beginning of a line of text in a memo field. Press the End key to get to the end of the text in a field or the end of a line of text in a memo field.

Field to Field
Press the Tab key to go from field to field. Shift-Tab will take you back one field. You can also move the mouse pointer to the field and single-click.

Page to Page
To move from page to page within a record:

- click on the page tabs at the top of the record, *or*
- press Ctrl-R (previous page) or Ctrl-N (next page), *or*
- press the Left and Right arrow keys (if the page tabs are already selected), *or*
- go to View on the menu bar and choose Previous Page or Next Page.

5. *How do I access the supplemental records?*

To access supplemental records :

- click on the Supplemental Information tab on the catalog record, *or*

- press Ctrl-R or Ctrl-N until the page you want

6. *How do I cancel a record?*

To cancel the record without saving the data:

- click on Cancel on the lower right corner of the screen, *or*
- click on the Cancel icon on the button bar, *or*
- go to File on the menu bar and select Cancel.

7. *How do I save a record?*

To save a record:

- click Save and Close on the lower right corner of the screen, *or*
- click the Save and Close icon on the button bar, *or*
- go to File on the menu bar and select Save and Close.

Note: You can also use the Save option instead of Save and Close. Save leaves the record window open in View mode after saving while Save and Close closes the record window after saving.

If you have not entered data in all the mandatory fields, the program will prompt you to enter the data. The message will list all required fields that have not been completed. The program then asks if you want to save the record as a draft.

If you choose...	***Then the program...***
Yes,	prompts you for tracking information for location, condition, scientific name and catalog notes (see Section F). You can choose not to update the supplemental information for these or enter the information. The program then enters "Draft Record" in the Object Status field and saves the record. **Note:** The program won't allow you to save a draft record if you have a duplicate catalog number.
No,	returns you to the screen to complete the mandatory field(s). **Note:** The mandatory fields will be marked with to indicate which fields are required.

Remember to update the Object Status field for all draft records. A draft record is not an official record. The CMR doesn't count draft records. For NPS, the National Catalog does not count or print draft records.

8. *What are the Images and Multimedia tabs at the top of the catalog record?*

You can attach and display many images of the object on the Images tab. The Multimedia tab allows you to attach other media files such as video and sound clips, documents, spreadsheets, PDF files, etc. Refer to Appendix G in this manual for information on Imaging and Multimedia.

9. *What is the Associations tab?*

You can create and view Associations (groupings) between different Catalog Records, including those in different directories and modules within ICMS. This is useful if you have items in different directories that are related by subject matter. For example, if you have catalog records in a Cultural Resources directory and a Natural History directory for items collected by

the same person and archival documentation about that collection, you can create an association between them.

You can create associations between the follow types of records in ICMS:

- Collections Module: Catalog Records
- Archives Module: Collection Level Records, Series Level Records, File Unit Level Records, and Item Level Records

Refer to Chapter 6, Section IX, Associated Records.

10. *Why does the same Description field appear on most of the tabs?*

The program displays a few lines of the Description field at the top of each of the catalog record's pages, with the exception of the discipline-specific page. You can enter data into any of the screens where the Description field appears and you will see the data you entered on all the screens that have the Description field.

11. *What are the catalog number and date in the upper right corner of the catalog record?*

The catalog number identifies the record. It appears as soon as you enter the number in the Catalog # field. The log date appears when you save the record. It indicates the date the record was entered into the computer.

C. Field-by-Field Instructions

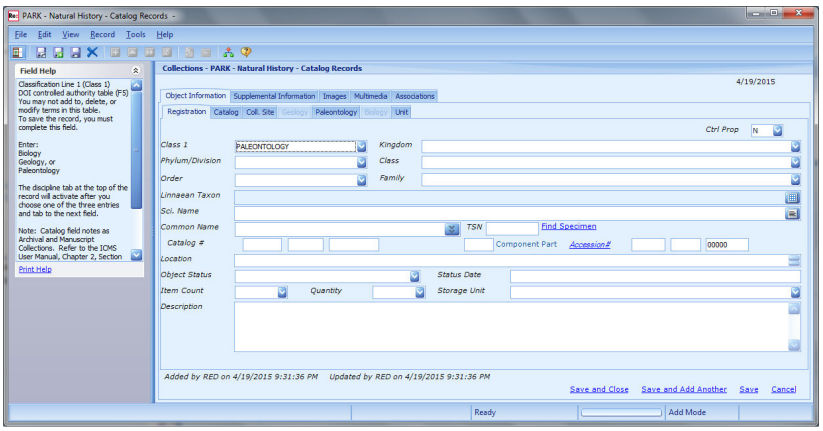
1. *How do I complete the data fields on the registration screen?*

Follow the field-by-field instructions for completing the fields on the registration screen. The instructions for each field are on the left side of the screen as you add or modify a record. Remember to press the Tab key to move out of a field.

Note: If you do not see the field help on the screen, go to View on the menu bar, go to Navigation Pane Options, and select Field Help.

Note: Fields marked with a ❖ in this manual are mandatory fields. You must complete these fields.

Remember to enter an accession record for the catalog record before you begin to catalog. Refer to Section I of Chapter 4 for information on entering accession records. You can also access the accession record from the catalog record as you enter the catalog data by clicking the Accession link.



❖*Controlled Property (Ctrl Prop)*

Logical Y/N field. **To save the record, you must complete this field.**

Type "Y" or "N." You can click on the arrow to see a pull-down menu of Y or N. Highlight the entry you want and single-click or press the Enter key.

Select "Y" (Yes) for controlled property. You must designate the following types of specimens as controlled property:

- specimens with a value of $1,000 or more
- type specimens
- incoming loans (with the exception of incoming loans to repositories)
- specimens especially vulnerable to theft, loss, or damage

Select "N" (No) for non-controlled property.

❖*Classification Line 1 (Class 1)*

Bureau controlled table (F5). **To save the record, you must complete this field.** You may not add to, delete, or modify terms in this table.

Enter: PALEONTOLOGY

Type "P" and the program will autofill the entry. Or you can press the F5 key or click the down arrow to view and select 'PALEONTOLOGY' from the table.

The Paleontology discipline tab will become active at the top of the record.

Note: Catalog field notes as archives. Refer to Section II in this chapter and the *MPH-II*, Appendix C: Historical and/or Scientific Document Collections, or the *MH-II*, Appendix D, Archival and Manuscript Collections.

After entering Paleontology in Class 1, you can skip to the TSN field and enter a valid TSN or, if you do not know the TSN, click Find Specimen to locate and select the specimen name from the ITIS table. The program will automatically complete these taxonomic classification fields for you: Kingdom, Phylum/Division, Class, Order, Family, Linnaean Taxon, Scientific Name, Common Name and TSN. Refer to Section D and E below for information on ITIS and using the Find Specimen function.

Or, you can enter the classification fields manually as follows.

❖*Kingdom*

Bureau controlled table (F5). You may not add to, delete, or modify terms in this table. **To save the record, you must complete this field**.

Completed by the system when you enter a valid TSN (Taxonomic Serial Number), or when you select a specimen name using the Find Specimen link. You can also enter the Kingdom manually by choosing an entry from the table. Press F5 or click the down arrow to view and select entries from the table.

NPS Note: In the previous versions of **ANCS+** for the NPS, this field was used for stratigraphic formation data. NPS records converted from the previous version will contain this formation data in the Kingdom field. This data was also copied during the conversion to the Formation field on the

Paleontology tab where it should now be entered. (The word 'formation' was removed during the conversion.)

To correct the Kingdom field on converted paleontology records, group your paleontology records according to the kingdom they belong in using a tag set or filter. Then, use Modify All to change the data in the Kingdom field to the correct kingdom. See Section III of Chapter 6 for information on using Modify All.

❖*Phylum/Division*

User-built table (F5, Ctrl-F5). **To save the record, you must complete this field.**

Completed by the system when you enter a valid TSN (Taxonomic Serial Number), or when you select a specimen name using the Find Specimen link. You can also enter the Phylum/Division manually by choosing an entry from the table.

As you type, the word will complete from an authority table of acceptable terms. Press the F5 key or click the down arrow icon to view and select terms from the table.

Users with the appropriate security rights can add, delete, or modify terms in the table. To add an entry to the table, right-click in the field and select Browse Authority Table or press Ctrl-F5, then click Add Term. After entering the term, click Save Change, then click Select to enter the term in the field.

Press Ctrl-Delete to remove unwanted entries.

❖*Class*

User-built table (F5, Ctrl-F5). **To save the record, you must complete this field.**

Completed by the system when you enter a valid TSN (Taxonomic Serial Number), or when you select a specimen name using the Find Specimen link. You can also enter the Class manually by choosing an entry from the table.

As you type, the word will complete from an authority table of acceptable terms. Press the F5 key or click the down arrow icon to view and select terms from the table.

Users with the appropriate security rights can add, delete, or modify terms in the table. To add an entry to the table, right-click in the field and select Browse Authority Table or press Ctrl-F5, then click Add Term. After entering the term, click Save Change, then click Select to enter the term in the field.

Press Ctrl-Delete to remove unwanted entries.

Order

User-built table (F5, Ctrl-F5).

Completed by the system when you enter a valid TSN (Taxonomic Serial Number), or when you select a specimen name using the Find Specimen link. You can also enter the Order manually by choosing an entry from the table.

As you type, the word will complete from an authority table of acceptable terms. Press the F5 key or click the down arrow icon to view and select terms from the table.

Users with the appropriate security rights can add, delete, or modify terms in the table. To add an entry to the table, right-click in the field and select Browse Authority Table or press Ctrl-F5, then click Add Term. After entering the term, click Save Change, then click Select to enter the term in the field.

Press Ctrl-Delete to remove unwanted entries.

Family

User-built table (F5, Ctrl-F5).

Completed by the system when you enter a valid TSN (Taxonomic Serial Number), or when you select a specimen name using the Find Specimen link. You can also enter the Family manually by choosing an entry from the table.

As you type, the word will complete from an authority table of acceptable terms. Press the F5 key or click the down arrow icon to view and select terms from the table.

Users with the appropriate security rights can add, delete, or modify terms in the table. To add an entry to the table, right-click in the field and select Browse Authority Table or press Ctrl-F5, then click Add Term. After entering the term, click Save Change, then click Select to enter the term in the field.

Press Ctrl-Delete to remove unwanted entries.

Linnaean Taxon

Repeating Formatted Memo field (click the repeating formatted memo icon at the end of the field to expand). This field is "read-only" and cannot be edited by the user.

Completed by the system when you enter a valid TSN (Taxonomic Serial Number), or when you select a specimen name using the Find Specimen link. The field displays all hierarchical ranks for the specimen, as found in the Integrated Taxonomic Information System (ITIS).

Note: If no valid TSN is provided, Linnaean Taxon is inactive. See Sections D and E for information on ITIS and Find Specimen.

Composite Classification

You can classify composite specimens in one of two ways:

- according to the specimen of primary interest, *or*
- by entering COMPOSITE in Phylum/Division (if needed) and Class

Unknown Classification

Sometimes a paleontology specimen is not fully identified when the specimen label is prepared. If you do not know the classification entry, you may enter UNIDENTIFIED in Phylum/Division and Class, as needed.

Specimens without a Class Entry

Some paleontological specimens, such as fungi, have only a Kingdom and Phylum/Division classification. If a specimen doesn't have a Class entry, enter UNUSED in the Class field.

❖*Scientific Name (Sci. Name)*

Formatted memo field. Press F12 or right-click and select Zoom from the menu to expand the field, or click the formatted memo icon  located in the

field. The field will also expand as you type. History tracking field that links to the Scientific Name supplemental record. **To save the record, you must complete at least the Genus subfield of this field.**

Completed by the system when you enter a valid TSN (Taxonomic Serial Number), or when you select a specimen name using the Find Specimen link. If a scientific name is not already listed in the ITIS taxonomy module, you can also enter the data manually. See user-built table instructions under Genus below.

The field expands into six subfields: Genus, Species Modifier, Species, Species Authority, Year, and Descriptive Name.

An underline separates the subfield entries on the registration screen. If the specimen is unidentified, refer to the *MH-II*, Appendix H. If the specimen requires a descriptive name, use the Descriptive Name subfield to enter the name. You may also use the Descriptive Name field to enter additional specimen names for composite specimens.

Example: Acer __aff. __rubrum __Boyd __1958

Example of unidentified specimen: Plant, unidentified

Example of descriptive name: tridactyl (3 toed) track

The program allows you to track changes in scientific name. If you add or modify a scientific name, the program will include the Scientific Name supplemental in the Track Changes window when you save the record. A history of scientific name changes appears in the Scientific Name supplemental record. Refer to Section XXII of Chapter 3 for information on the Scientific Name supplemental record.

If you wish to enter the Scientific Name manually, use the following subfield instructions:

For the user-built tables: As you type, the word will complete from an authority table of acceptable terms. Press the F5 key or click the down arrow icon to view and select terms from the table.

Users with the appropriate security rights can add, delete, or modify terms in the table. To add an entry to the table, right-click in the field and select Browse Authority Table or press Ctrl-F5, then click Add Term. After entering the term, click Save Change, then click Select to enter the term in the subfield. Follow this procedure for all user-built table subfields in the Scientific Name formatted memo screen.

Press Ctrl-Delete to remove unwanted entries.

For the authority subfield, the user-built table links to the Names and Addresses associated module. As you type, the authority name will complete from an authority table of names in the Names and Addresses associated module. Press the F5 key or click the person icon  to view and select names from the table, or press F12 for an expanded field that allows you to enter terms from the table.

Users with the appropriate security rights can add, delete, or modify names in the table. To add a name to the table, right-click in the field, and select Browse Authority Table or press Ctrl-F5, then click Add. The Names and

Addresses associated module screen will appear. Enter the name in the Name ID field and complete the other fields on the screen. You can also press F12, click on the Edit Authority Table link, and then click Add. The entry you add will appear in the table. You can then select it from the table.

Genus (user-built table) (F5, Ctrl-F5):

Enter the generic name of the specimen, which is the first element of the scientific name.

Example: Acer

Species Modifier (user-built table) (F5, Ctrl-F5):

Enter the Latin abbreviation antecedent to species to reflect certainty of identification. You will only use this field in special situations.

Example: aff.

Species (user-built table) (F5, Ctrl-F5):

Enter the specific epithet, which is the second element of the scientific name.

Example: rubrum

Species Authority (user-built table that links to the Names and Addresses associated module) (F5, Ctrl-F5):

Enter the authority as it appears on the specimen label. Do not add an authority if it is not on the label.

Example: Boyd

Species Year (Year) (flexible date field):

Enter the year of identification by the species authority.

Example: 1958

Descriptive Name (Desc. Name) (memo field, F12 to expand):

Enter the descriptive name for the specimen. Standardize names as much as possible.

Example: sinuous trail

Note: You may also use this field to enter additional specimen names for composite specimens.

Common Name (Com. Name)

User-built, stacked table (F5, Ctrl-F5, F12)

Completed by the system when you enter a valid TSN (Taxonomic Serial Number), or when you select a specimen name using the Find Specimen link. If no valid TSN is provided, you can enter the common name manually by selecting an entry from the table.

As you type, the word will complete from an authority table of acceptable terms. Press the F5 key or click the down arrow icon to view and select terms from the table, or press F12 for an expanded field that allows you to enter terms from the table.

Users with the appropriate security rights can add, delete, or modify terms in the table. To add an entry to the table, right-click in the field and select Browse Authority Table or press Ctrl-F5, then click Add Term. After entering the term, click Save Change, then click Select to enter the term in the field. The expanded field (F12) also allows users to add, delete, and edit.

You can make multiple entries from the expanded field (F12). After entering the first term, click the Add link or press the down arrow on the keyboard. An additional field appears below the first entry for you to select another term from the table. When saved, a double dash -- separates entries.

Click Delete or press Ctrl-Delete to remove unwanted entries.

Taxonomic Serial Number (TSN)

Straight entry field with a maximum of seven characters.

Enter the TSN, the unique number assigned to each name in the Integrated Taxonomic Information System (ITIS) standard taxonomic database.

Example: 175300 (represents Accipiter gentilis)

When you enter a valid TSN and tab out of the field, the system will automatically fill in these fields: Kingdom, Phylum/Division, Class, Order, Family, Linnaean Taxon, Scientific Name, and Common Name.

Note: The TSN for paleontological entries in the ITIS database is usually a negative number unless the fossil is of a living taxon.

See Section D for further information on ITIS, or visit their web site at http://www.itis.gov.

❖*Catalog Number (Catalog #)*

For NPS, this is a 3-part 12-character field (sortable by acronym and number). For DOI, this is a regular, unedited, 60-character field. **To save the record, you must complete this field.**

NPS Catalog Number format:

a. The first part is the four-letter park acronym, in the form of "AAAA." (**Note:** The acronym will autofill from the record you were viewing when you began to Add a new record.)

b. The second part is a collection designation. Leave this space blank if the park has only one collection.

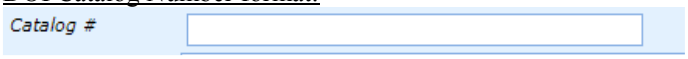
If the park has different units that have separate accession and catalog systems, enter a collection designation in the form of a letter, for example, A, B, C. Only a few parks will use this designation.

The Chief Curator must approve the designation. Review requests to use a designation with the Regional Curator. Send requests in writing to the Chief Curator, WASO.

c. The third part is the unique sequential number assigned to an object, for example, 9999999.

Example: SHEN 190
YELLO 6778 [The Yellowstone NP number contains an O as a designation for the herbarium collection.]

DOI Catalog Number format:



Enter a catalog number using a standard format. The first part of the catalog number should be your unit acronym.

Example: BLM 1968.035.011

Note: The program will not allow you to enter a catalog number of "0" or a duplicate catalog number. After you enter the catalog number, it appears above the record in the upper right corner.

Component Part

4-character field in the form of "a-aa" that links to the Component Parts supplemental record.

Enter suffixes for component parts of specimens that you consider to be a single unit, such as the skull and femur of a skeleton or the part and counterpart of a fossil leaf. Refer to *MH-II*, Appendix C, or to *MPH-II*, Appendix J, for a further explanation of component parts.

Component part designations:

No. parts	Entry
2	a-b
3	a-c
26	a-z
27	a-aa
52	a-az
53	a-ba
78	a-bz

Enter descriptions of each component part in the Component Parts supplemental record. To access the supplemental record, click on the Component Part link, or tab to the link and press the Enter key. Refer to Section IV of Chapter 3 for information on the Component Parts supplemental record.

❖*Accession Number (Accession #)*

For NPS, this is a 3-part 10-character field.
For DOI, this is a regular, unedited, 60-character field. **To save the record, you must complete this field.**

NPS Accession Number format:

a. The first part is the four-letter park acronym, in the form of "AAAA." (**Note:** The acronym will autofill from the record you were viewing when you began to Add a new record.)

b. The second part is a hyphen, which distinguishes the accession number from the catalog number.
(**Note:** The hyphen will also autofill from the previous record.)

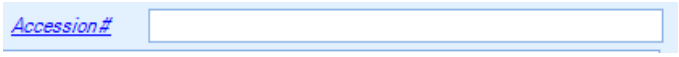
If the park has different units with separate accession and catalog systems, enter a collection designation in the form of a letter, for example, A, B, C, in place of the hyphen. Only a few parks will use a collection designation.

The Chief Curator must approve the designation. Review requests to use a designation with the Regional Curator. Send requests in writing to the Chief Curator, WASO.

c. The third part is the 5-digit identification number assigned to an accession, for example, 99999. The program automatically pads the number with zeroes.

Example: YOSE-00001
JELAB00072 [The Jean Lafitte NHP accession number contains a B as a designation for the Barataria collection.]

DOI Accession Number format:



Enter the number for the accession using a standard format. The first part of the accession number should be your unit acronym.

Example: BLM 1968.035

Note: The accession number links the catalog record to the Accession Records associated module. Refer to Section I of Chapter 4 for information on the Accession Records associated module. The accession record contains the Acquisition Type and Acquisition Date fields that appear on the Museum Catalog Record (NPS Form 10-254B or DOI NH Museum Catalog Record). To go to the accession record, click on the Accession link on the screen. You can view, add, or modify the accession record for the object you are cataloging. Click on Save and Close to return to the catalog record screen. You cannot view, add, or modify the other accession records in the module from this link.

❖*Location*

Memo field (F12 to expand). History tracking field that links to the Location supplemental record. **To save the record, you must complete this field.**

Enter the physical storage location of the specimen, starting with the most general location. For example, enter the building number or name, room number, cabinet number, and the shelf number.

Pad location numbers with zeroes if you want to sort by location. For example, use DR04 rather than DR4.

Develop standardized terms and abbreviations for storage areas and use these consistently. Enter locations from general to specific. Separate entries with a space.

A list of recommended abbreviations:

HS	Historic Structure
BLDG	Building
RM	Room
CAB	Cabinet
FCAB	File Cabinet
FCDR	File Cabinet Drawer
MC	Map Case

C	Case
SEC	Section
SH	Shelf
R	Rack
BX	Box
DR	Drawer
U	Unit

Example: HS 1 RM 101 SH 5
BLDG 18 RM 1 U 13

For specimens stored outside the unit, enter the name of the institution where the specimens are located, such as WACC or University of Texas.

Note: If specimens are located in another institution, you can also enter a tracking number used by that institution.

Example: WACC-00254

The program allows you to track changes in location. If you modify a location, the program will include the location supplemental in the Track Changes window when you save the record. See Section F below. A history of location changes appears in the Location supplemental record.

Refer to Section XII of Chapter 3 for information on the Location supplemental record.

❖ *Object Status*

Bureau controlled table (F5). History tracking field that links to the Object Status supplemental record. **To save the record, you must complete this field.** You may not add to, delete, or modify terms in this table.

Enter the current status of the specimen. Choose from the following options:

Deacc - Conveyance (Donation)
Deacc - Destructive Analysis
Deacc - Exchange
Deacc - Involuntary Destruction
Deacc - Loss
Deacc - NAGPRA Compliance
Deacc - Return to Rightful Owner
Deacc - Theft
Deacc - Transfer DOI
Deacc - Transfer NPS
Deacc - Transfer Other Federal Agency
Deacc - Voluntary Destruction/Abandonment
Draft Record
Exhibit
Exhibit - Incoming Loan
Incorporated into Larger Archival Collection
Loan Out - Non-NPS (or Loan Out - Non-Bureau - Federal)
Loan Out - Non-NPS - Non-Federal (or Loan Out - Non-Bureau - Non-Federal)
Loan Out - NPS (or Loan Out - Bureau)
Missing
Record Inactive
Removed - Non-Museum property
Storage

Storage - Incoming Loan
Storage - Non-Bureau (not used for NPS)

As you type, the word will complete from an authority table of acceptable terms. Press the F5 key or click the down arrow icon to view and select terms from the table.

The program tracks changes in status but doesn't prompt you to enter a reason when you modify a status. A history of status changes appears in the Object Status supplemental record. You can go into the supplemental record and add a reason for status changes, if needed.

Refer to Section XIV of Chapter 3 for information on the Object Status supplemental record.

Remember to update the Object Status field. The program pulls data for the CMR from this field and the Status Date field.

❖ *Status Date*

Straight entry numeric field. **To save the record, you must complete this field.**

Enter the 4-digit fiscal year for which the status applies.

Example: 1990
2001

Note: The fiscal year runs from October 1 - September 30. The program uses the fiscal year to pull Object Status and Status Date data for the CMR.

❖ *Item Count*

Straight entry numeric field. **To save the record, you must complete either the Item Count or the Quantity field.**

You must enter either an item count or a quantity (see the following field). There is a calculator linked to the field to help you calculate an accurate count or quantity. Click on the down arrow icon to use the calculator. (Press F4 to close the calculator.)

Enter 1 for a single specimen, even if the specimen has component parts. If the specimen is lot cataloged, enter the total number of objects in the lot. Refer to the *MH-II*, Appendix I, or the *MPH-II*, Appendix E, for information on cataloging lots.

Example: 17 pieces of petrified wood = 17
4 slabs = 4

When you enter an item count, the program automatically enters "EA" in the Storage Unit field. If you do not have an item count, leave the field blank.

Note: The individual fossilized bones of a skeleton are considered component parts of a single item. See the Component Parts field above for information on listing the individual elements of a specimen.

❖ *Quantity*

Straight entry numeric field with two decimal places. **To save the record, you must complete either the Item Count or the Quantity field.**

You must enter either an item count or a quantity (see the previous field). There is a calculator linked to the field to help you calculate an accurate count or quantity. Click on the down arrow icon to use the calculator. (Press F4 to close the calculator.)

For bulk specimens (specimens that cannot be readily counted), enter the number of storage units, such as bag or box. If you enter a quantity, the Storage Unit field cannot be "EA." If you do not have a quantity, leave the field blank.

Example: 2 bags of dental and bone fragments = 2.00

❖ *Storage Unit*

User-built table (F5, Ctrl-F5). Default value "EA" when the Item Count is greater than zero. **To save the record, you must complete this field**.

Enter the type of storage unit for bulk specimens (specimens that cannot be readily counted). This is the storage unit for the quantity. For example, the quantity for 2 bags of dental and bone fragments is 2.0 and the storage unit is Bag.

Example: Bag
Vial

As you type, the word will complete from an authority table of acceptable terms. Press the F5 key or click the down arrow icon to view and select terms from the table.
Users with the appropriate security rights can add, delete, or modify terms in the table. To add an entry to the table, right-click in the field and select Browse Authority Table or press Ctrl-F5, then click Add Term. After entering the term, click Save Change, then click Select to enter the term in the field.

Press Ctrl-Delete to remove unwanted entries.

❖ *Description*

Memo field (F12 to expand).

Enter a description of the specimen. The description should provide enough information to identify the specimen from others. Enter the most distinguishing and significant features of a specimen. Do not use unauthorized abbreviations or codes.

Note: This field appears on and can be edited from all other tabs except the discipline tabs.

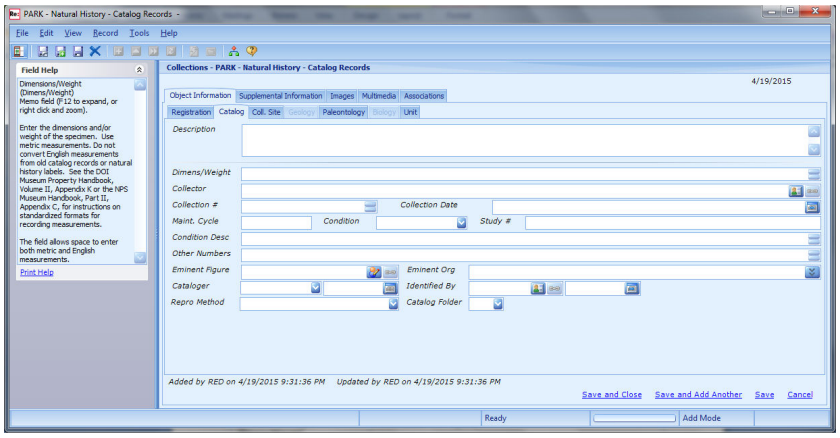
You have completed the registration screen. Click on the Catalog tab or press Ctrl-N to go to the catalog screen.

2. *How do I complete the data fields on the catalog screen?*

Follow the field-by-field instructions for completing the fields on the catalog screen. The instructions for each field are on the left side of the screen as you add or modify a record. Remember to press the Tab key to move out of a field.

Note: If you do not see the field help on the screen, from View on the menu bar, go to Navigation Pane Options, and select Field Help.

Note: Fields marked with a ❖ in this manual are mandatory fields.



Dimensions/Weight (Dimens/Weight)

Memo field (F12 to expand).

Enter the dimensions and/or weight of the specimen. Use metric measurements. Do not convert English measurements from old catalog records or natural history labels. See *MH-II*, Appendix C, or the *MPH-II*, Appendix K, for instructions on standardized formats for recording measurements.

The field contains space to enter both metric and English measurements.

❖*Collector*

User-built, stacked table (F5, Ctrl-F5, F12) that links to the Names and Addresses associated module. The program will enter "Not Provided" if you do not complete this field.

Note: If there are no names in the Names and Addresses associated module, you must enter them into the authority table before you can enter the name in this field.

Enter the full name of the person, last name first, who collected the specimen.

Example: Merriam, C. Hart

As you type, the word will complete from an authority table of names that have already been entered in the Names and Addresses associated module. Press the F5 key or click the person icon to view and select names from the table, or press F12 for an expanded field that allows you to enter terms from the table.

If a name is not already listed in the authority table, users with the appropriate security rights can add, delete, or modify names in the table. To add a name to the table, right-click in the field, and select Browse Authority Table or press Ctrl-F5, then click Add. The Names and Addresses associated module screen will appear. Enter the name in the Name ID field and complete the other fields on the screen. You can also press F12, click on the Edit Authority Table link, and then click Add. The entry you add will appear in the table. You can they select it from the table.

You can make multiple entries from the expanded field (F12). After entering the first name, click the Add link or press the down arrow on the keyboard. An additional field appears below the first entry for you to select another name from the table. When saved, a double dash -- separates entries.

Click Delete or press Ctrl-Delete to remove unwanted entries.

Note: The record link icon next to the person icon allows you to view the Names and Addresses record for your entry.

Refer to Section XII of Chapter 4 for information on the Names and Addresses associated module.

❖*Collection Number (Collection #)*

Memo field (F12 to expand). The program will enter "Not Provided" if you do not complete this field.

Enter the field number or other identifying number the collector assigned to the specimen.

❖*Collection Date*

Flexible date field. You must complete this field if you have a collection date.

Enter the date(s) on which the collector collected the specimen. Enter the most complete date possible and the full year.

You can enter the date directly, or press F12 or click the calendar icon for the flexible date entry screen. The flexible date entry allows you to enter a beginning and ending date by century or year, month, and day. It includes a user-built table of modifiers, for entries such as "circa." Refer to Chapter 1, System Basics, for additional instructions on flexible date fields. Use of the flexible date screen is optional.

Maintenance Cycle (Maint. Cycle)

Straight entry numeric field.

Enter the cycle of years (up to 9.9 years) in which a condition check or preservation /treatment will be needed. You may enter one decimal place for a portion of a year. The year of initiation follows the slash (/).

Example: 5.0/1986 [entry for 5 years starting in 1986]
1.5/1990 [entry for 18 months starting in 1990]
0.5/1994 [entry for 6 months starting in 1994]

Use the Preservation/Treatment associated module to describe the type of maintenance that the specimen needs. Refer to Section VII of Chapter 4 for information on the Preservation/Treatment associated module.

❖*Condition*

Bureau controlled table (F5). History tracking field that links to the Condition Reports supplemental record. **To save the record, you must complete this field.** You may not add to, delete, or modify terms in this table.

Enter the condition of the specimen using one term from each of the two criteria groups:

GROUP I
COM: Complete [100% of specimen present]
INC: Incomplete [>50% and <100% of specimen present]
FRG: Fragment [≤50% of specimen present]

GROUP II
EX: Excellent [no damage or deterioration]
GD: Good [minor damage and no active deterioration]
FR: Fair [some damage and/or active deterioration]
PR: Poor [significant damage and/or active deterioration]

As you type, the word will complete from an authority table of acceptable terms. Press the F5 key or click the down arrow icon to view and select terms from the table.

The program allows you to track changes in condition. If you modify a condition, the program will include the Condition Reports supplemental in the Track Changes window when you save the record. See Section E below. A history of condition changes appears in the Condition Reports supplemental record. Refer to Section V of Chapter 3 for additional information on the Condition Reports supplemental record.

Condition Description (Condition Desc)

Memo field (F12 to expand). History tracking field that links to the Condition Reports supplemental record.

Enter detailed descriptive information on a specimen's condition.

Study Number (Study #)

Straight entry field.

Enter the unique study identification number. The unit assigns this number along with the permit number on the collection permit form. The format is "UNIT-Number." "UNIT" is the unit acronym, and "Number" is the unique tracking number. The study number links all permits, reports, and correspondence related to the study over the life of the project.

Example: ACAD-000001

Note: Study Number is NOT the same as the catalog number or accession number.

Other Numbers

Memo field (F12 to expand).

Record any other numbers that have been assigned to the specimen. This can include catalog numbers from a previous owner or collection or a number assigned by a partner repository if the specimen is not housed at the unit. If known, indicate a source for the other number.

Eminent Figure

User-built, stacked table (F5, Ctrl-F5, F12) that links to the Artist/Maker/Eminent Figure associated module.

Enter the full name, last name first, of the eminent person(s) directly associated with a specimen through use or possession. An eminent figure may be someone of international importance or someone of significance only to the site. To maintain consistent entries, develop a list of eminent figures related to the collection.

Example: Bones, T. J.

As you type, the name will complete from an authority table of names from the Artist/Maker/Eminent figure associated module. Press the F5 key or click the artist icon  to view and select terms from the table, or press F12 for an expanded field that allows you to enter names from the table.

Users with appropriate security rights can press Ctrl-F5 or click Edit Authority Table on the expanded field to add, delete, or edit names in the table. Click Add to add a new entry. The Artist/Maker/Eminent Figure screen allows you to enter information such as birth and death years, accomplishments, and nationality. The entry you add will appear in the table.

Refer to Section XI of Chapter 4 for information on the Artist/Maker/ Eminent Figure associated module.

To make multiple entries, press F12 to expand the field. Then click Add or press the down arrow to enter additional terms. On each new line, begin typing or press F5 to select the term from the table. When saved, a double dash -- separates terms.

Click Delete or press Ctrl-Delete to remove unwanted entries.

Note: The record link icon  next to the artist icon allows you to view the Artist/Maker record for your entry.

Eminent Organization (Eminent Org)

User-built, stacked table (F5, Ctrl-F5, F12).

Enter the full organizational name of the eminent organization directly associated with a specimen. An eminent organization may be of international importance or of significance only to the site. To maintain consistent entries, develop a list of eminent organizations related to the collection.

Example: The Nature Conservancy

As you type, the word will complete from an authority table of acceptable terms. Press the F5 key or click the down arrow icon to view and select terms from the table, or press F12 for an expanded field that allows you to enter terms from the table.

Users with the appropriate security rights can add, delete, or modify terms in the table. To add an entry to the table, right-click in the field and select Browse Authority Table or press Ctrl-F5, then click Add Term. After entering the term, click Save Change, then click Select to enter the term in the field. The expanded field (F12) also allows users to add, delete, and edit.

You can make multiple entries from the expanded field (F12). After entering the first term, click the Add link or press the down arrow on the keyboard. An additional field appears below the first entry for you to select another term from the table. When saved, a double dash -- separates entries.

Click Delete or press Ctrl-Delete to remove unwanted entries.

❖ *Cataloger*

User-built table (F5, Ctrl-F5). **To save the record, you must complete this field.**

Enter the full name, last name first, of the person who cataloged the specimen.

As you type, the word will complete from an authority table of acceptable terms. Press the F5 key or click the down arrow icon to view and select terms from the table.

Users with the appropriate security rights can add, delete, or modify terms in the table. To add an entry to the table, right-click in the field and select Browse Authority Table or press Ctrl-F5, then click Add Term. After entering the term, click Save Change, then click Select to enter the term in the field.

Press Ctrl-Delete to remove unwanted entries.

Note: Change this field only when you make a significant modification to the record. Do not change the cataloger for minor modifications, such as location changes.

Catalog Date

Date field. (**Note:** This date field is not labeled on the screen.)

Enter the numeric month, day, and full year that the specimen was cataloged. The program will autofill as you type. To view a calendar and select the date, click the calendar icon and click on the day.

Example: 4/30/2005

❖*Identified By*

User-built, stacked table (F5, Ctrl-F5, F12) that links to the Names and Addresses associated module. History tracking field that links to the Scientific Name supplemental record. **To save the record, you must complete this field.**

Enter the full name of the person, last name first, who identified the specimen. If you do not have an entry, enter Unknown.

Example: Jones, Sarah

As you type, the word will complete from an authority table of names in the Names and Addresses associated module. Press the F5 key or click the person icon to view and select names from the table, or press F12 for an expanded field that also allows you to enter terms from the table.
Users with the appropriate security rights can add, delete, or modify names in the table. To add a name to the table, right-click in the field, and select Browse Authority Table or press Ctrl-F5, then click Add. The Names and Addresses associated module screen will appear. Enter the name in the Name ID field and complete the other fields on the screen. You can also press F12, click on the Edit Authority Table link, and then click Add. The entry you add will appear in the table. You can they select it from the table.

You can make multiple entries from the expanded field (F12). After entering the first name, click the Add link or press the down arrow on the keyboard. An additional field appears below the first entry for you to select another name from the table. When saved, a double dash -- separates entries.

Click Delete or press Ctrl-Delete to remove unwanted entries.

Refer to Section XII of Chapter 4 for information on the Names and Addresses associated module.

Note: The record link icon next to the person icon allows you to view the Names and Addresses record for your entry.

The program allows you to track changes in identifier. If you change the name of the identifier, the program will include the Scientific Name supplemental in the Track Changes window when you save the record. A history of changes in identifier appears in the Scientific Name supplemental record.

Refer to Section XXII of Chapter 3 for information on the Scientific Name supplemental record.

Identified Date

Flexible date field. History tracking field that links to the Scientific Name supplemental record. (**Note:** This date field is not labeled on the screen.)

Enter the date of identification. Enter the most complete date possible and the full year.

You can enter the date directly in the field or click the calendar icon  for the flexible date entry screen. The flexible date entry allows you to enter a beginning and ending date by century or year, month, and day. It includes a user-built table of modifiers, for entries such as "circa." Refer to Chapter 1, System Basics, for additional information on flexible date fields. Use of the flexible date screen is optional.

The program allows you to track changes in the identification date. If you change the date the specimen was identified, the program will include the Scientific Name supplemental in the Track Changes window when you save the record. A history of identification date changes appears in the Scientific Name supplemental record.

Refer to Section XXII of Chapter 3 for information on the Scientific Name supplemental record.

Reproduction Method (Repro Method)

Bureau controlled table (F5). You may not add to, delete, or modify terms in this table.

Choose from the four entries in the table:

Cast
Mold
Other

As you type, the word will complete from an authority table of acceptable terms. Press the F5 key or click the down arrow icon to view and select terms from the table.

Catalog Folder

Logical Y/N field.

Select "Y" (Yes) if a catalog folder exists for the specimen.

Select "N" (No) if there is no catalog folder for the specimen.

Refer to the *MH-II*, Chapter 3, Cataloging, or the *MPH-II*, Chapter 3, Cataloging, for information on catalog folders.

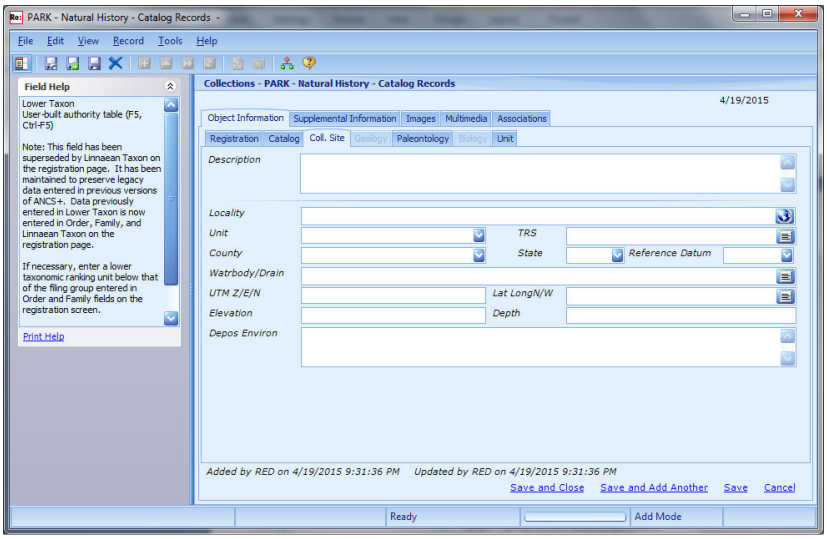
You have completed the catalog screen. Click on the Coll. Site tab or press Ctrl-N to go to the collection site screen.

3. *How do I complete the data fields on the collection site screen?*

Follow the field-by-field instructions for completing the fields on the collection site screen. The instructions for each field are on the left side of the screen as you add or modify a record. Remember to press the Tab key to move out of a field.

Note: If you do not see the field help on the screen, go to View on the menu bar, go to Navigation Pane Options, and select Field Help.

Note: Fields marked with a ❖ in this manual are mandatory fields.



Locality

Special Memo field (F12 to expand, or right click and zoom).
Linked to the Locality associated module.

Enter the locality name for the collection site. You can enter the locality by one of the following options:

- Simply type the locality name in the field, *or*
- Click on the Locality icon, or press F12 to access the Locality table. To choose an entry from the table, highlight the entry and click Save. Click Add to add a new locality record. The Locality associated module screen will appear. This screen allows you to enter information about the locality, such as ownership and related sites.

Refer to Section X of Chapter 4 for information on the Locality associated module.

Unit

User-built table (F5, Ctrl-F5).

If the collection site is within unit boundaries, enter the unit acronym.

As you type, the word will complete from an authority table of acceptable terms. Press the F5 key or click the down arrow icon to view and select terms from the table.

Users with the appropriate security rights can add, delete, or modify terms in the table. To add an entry to the table, right-click in the field and select Browse Authority Table or press Ctrl-F5, then click Add Term. After entering the term, click Save Change, then click Select to enter the term in the field.

Press Ctrl-Delete to remove unwanted entries.

❖ *Township/Range/Section (TRS)*

Formatted memo field. **To save the record, you must complete one of these fields: Township/Range/Section, UTM Coordinates, or Latitude and Longitude.** If you don't have any data for these fields, enter Unknown in the memo subfield of the Latitude and Longitude field.

New records should have UTM or Lat/Long data. Use TRS data only if UTM or Lat/Long data are not available. Press F12 or right-click and select

Zoom from the menu to expand the field, or click the formatted memo icon  located in the field. The field will also expand as you type.

The field will expand into nine subfields: Township, Range, Section, three Quarter/Half subfields, Quad Map Name, Quad Map Scale, and Quad Map Year. An underline separates the subfield entries on the collection site screen.

Enter the township, range, and section of the collection site, if the collector provides these data. The subfields are formatted as follows:

Township = T. + 3 numbers and 1 character
Range = R. + 4 numbers and 1 character
Section = Sec. + 2 numbers

Example: T.2O N. __R.118 W. __Sec.5.

Enter the appropriate 2-letter abbreviation for Quarter sections (NE, NW, SE, or SW), or 1-letter abbreviation for Half-sections (N, S, E, or W). A quarter section in the government system of land surveying in the U.S. and Canada is a tract of land half a mile square that contains 160 acres (648) hectares). Enter the quarter and/or half sections in order from largest to smallest.

Example: NW 1/4 (160 acres)
SE 1/4 (40 acres)
N 1/2 (20 acres)

Quad Map Name (straight entry):

Enter the quadrangle map name from the USGS topographic map series that was used to determine the township/range/section data. Most USGS map series divide the United States into quadrangles bounded by two lines of latitude and two lines of longitude. For example, a 7.5-minute map shows an area that spans 7.5 minutes of latitude and 7.5 minutes of longitude, and it is usually named after the most prominent feature in the quadrangle. More than 55,000 7.5-minute maps were made to cover the 48 conterminous States. This is the only uniform map series that covers the entire area of the United States in considerable detail.

Quad Map Scale (user-built authority table -- F5, Ctrl-F5):

Click the down arrow or press F5 and choose the scale of the quadrangle map from the USGS topographic map series that was used to determine the township/range/section data. The best known USGS maps are the 1:24,000-scale topographic maps, also known as 7.5-minute quadrangles or "quads". Maps at scales of 1:250,000 (1 inch = about 4 miles), 1:500,000 (1 inch = about 8 miles), and 1:1,000,000 (1 inch = about 16 miles) cover very large areas on each sheet and are used in regional and statewide planning.

Quad Map Year (straight entry):

Enter the year that the quadrangle map was published. The United States Geological Survey has been the primary civilian mapping agency of the United States with the responsibility for mapping the country since 1879.

County

User-built table (F5, Ctrl-F5).

Enter the county from which the specimen was originally collected.

Example: Orange

As you type, the word will complete from an authority table of acceptable terms. Press the F5 key or click the down arrow icon to view and select terms from the table.

Users with the appropriate security rights can add, delete, or modify terms in the table. To add an entry to the table, right-click in the field and select Browse Authority Table or press Ctrl-F5, then click Add Term. After entering the term, click Save Change, then click Select to enter the term in the field.

Press Ctrl-Delete to remove unwanted entries.

State

User-built table (F5, Ctrl-F5).

Enter the state from which the specimen was originally collected. Use the two-letter US Postal Code. The program includes a table for all states.

As you type, the word will complete from an authority table of acceptable terms. Press the F5 key or click the down arrow icon to view and select terms from the table.

Users with the appropriate security rights can add, delete, or modify terms in the table. To add an entry to the table, right-click in the field and select Browse Authority Table or press Ctrl-F5, then click Add Term. After entering the term, click Save Change, then click Select to enter the term in the field.

Press Ctrl-Delete to remove unwanted entries.

Reference Datum

User-built authority table (F5, Ctrl-F5)

Enter the reference datum for the specimen by choosing an entry from the table. All coordinate data such as UTM or longitude and latitude used to identify the spatial coordinates of a locality must be referenced to a datum. This information may be obtained while using a Global Positioning System (GPS) or from the map that is used to determine the coordinates. NAD 27, NAD 83, and WGS 84 are commonly used.

As you type, the word will complete from an authority table of acceptable terms. Press the F5 key or click the down arrow icon to view and select terms from the table.

Users with the appropriate security rights can add, delete, or modify terms in the table. To add an entry to the table, right-click in the field and select Browse Authority Table or press Ctrl-F5, then click Add Term. After entering the term, click Save Change. Click Select to enter the term in the field.

Press Ctrl-Delete to remove unwanted entries.

Waterbody/Drainage (Watrbody/Drain)

Formatted memo field. Press F12 or right-click and select Zoom from the menu to expand the field, or click the formatted memo icon  located in the field. The field will also expand as you type.

The field will expand into three subfields: Waterbody, Drainage and HUC. An underline separates the subfield entries on the collection site screen.

Waterbody (memo field):

For aquatic and marine sites only, record the waterbody of the collection site.

Example: Merced Lake

***Drainage (memo field)*:**

For aquatic and marine sites only, record the drainage of the collection site.

Example: Gulf of Mexico
Potomac River

HUC (Hydrologic Unit Code) (user-built authority table -- F5, Ctrl-F5):

Enter a standard 8-digit hydrologic unit code.

❖*UTM Coordinates (UTM Z/E/N)*

Straight entry numeric field. **To save the record, you must complete one of these fields: Township/Range/Section, UTM Coordinates, or Latitude and Longitude.** If you don't have any data for these fields, enter Unknown in the memo subfield of the Latitude and Longitude field.

Enter the UTM (Universal Transverse Mercator Grid) coordinates for the collection site, if the collector provides these data. You cannot enter characters. The field is divided into three parts separated by slashes (/):

a. UTM Zone = 2 numbers

b. Easting = 6 numbers

c. Northing = 7 numbers

Example: 05/291000/4264000 [entry for UTM zone 5, 291000E, 4264000N]

❖*Latitude and Longitude (Lat LongN/W)*

Formatted memo field. Press F12 or right-click and select Zoom from the menu to expand the field, or click the formatted memo icon  located in the field. The field will also expand as you type. **To save the record, you must complete one of these fields: Township/Range/Section, UTM Coordinates, or Latitude and Longitude.** If you don't have any data for these fields, enter Unknown in the memo subfield of the Latitude and Longitude field.

The field will expand into seven subfields: Latitude Longitude, Latitude Degree, Latitude Minutes, Latitude Seconds, Longitude Degree, Longitude Minutes, and Longitude Seconds. An underline separates the subfield entries on the screen.

Enter the standard latitude and longitude for the collection site, if the collector provides these data.

Latitude Longitude (memo field):

F12 expands the subfield.

The other subfields are formatted as follows:

Latitude Degree = 2 numbers
Latitude Minutes = 2 numbers
Latitude Seconds = 2 numbers
Longitude Degree = 3 numbers
Longitude Minutes = 2 numbers
Longitude Seconds = 2 numbers

Precede numbers of less than two or three digits with a zero.

Example: __38 __30 __15 __118 __22 __30 [entry for 38 30' 15" N, 118 22' 30" W]

Elevation

Straight entry field.

Enter elevation, in meters, for terrestrial collection sites. Do not convert English measurements.

Example: 550 m.

The field contains space to enter both metric and English measurements.

Depth

Straight entry field.

Enter depth, in meters, for aquatic/marine collection sites. Do not convert English measurements.

Example: 5 m.

The field contains space to enter both metric and English measurements.

Depositional Environment (Depos Environ)

Memo field (F12 to expand).

Enter information about the environmental conditions under which the specimen was formed. This includes physical processes, such as water and wind; biological processes, such as bioturbation; and chemical processes, such as precipitation.

Example: paludal
swamp
inland sea

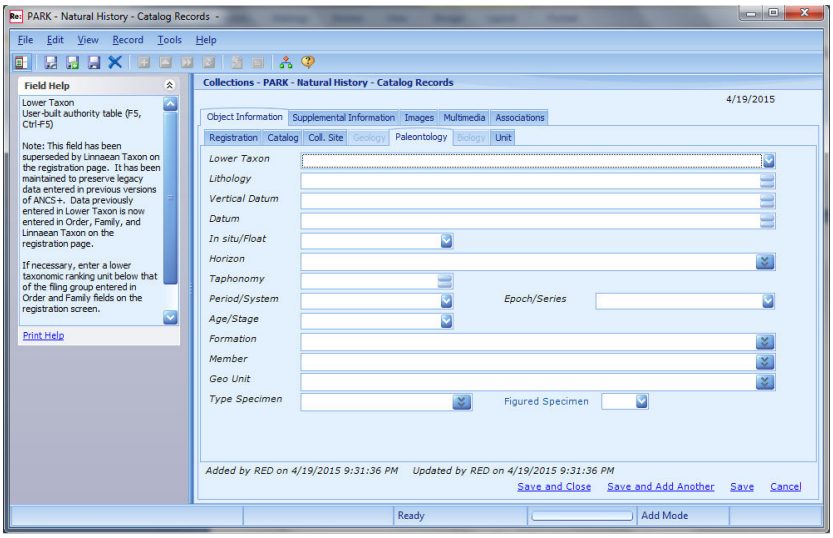
You have completed the collection site screen. Click on the Paleontology tab or press Ctrl-N to go to the paleontology screen.

4. *How do I complete the data fields on the paleontology specialty screen?*

Follow the field-by-field instructions for completing the fields on the paleontology specialty screen. The instructions for each field are on the left side of the screen as you add or modify a record. Remember to press the Tab key to move out of a field.

Note: If you do not see the field help on the screen, go to View on the menu bar, go to Navigation Pane Options, and select Field Help.

Note: Fields marked with a ❖ are mandatory fields.



Lower Taxon

User-built table (F5, Ctrl-F5)

Note: This field has been superseded by Linnaean Taxon on the registration page. It has been maintained to preserve NPS legacy data entered in previous versions of **ANCS+**. Data previously entered in Lower Taxon now appears in the Linnaean Taxon field on the registration page.

If you wish to enter data, as you type, the word will complete from an authority table of acceptable terms. Press the F5 key or click the down arrow icon to view and select terms from the table. If there are no terms in the table, you will need to add terms before using these features.

Users with the appropriate security rights can add, delete, or modify terms in the table. To add an entry to the table, right-click in the field and select Browse Authority Table or press Ctrl-F5, then click Add Term. After entering the term, click Save Change, then click Select to enter the term in the field.

Press Ctrl-Delete to remove unwanted entries.

Lithology

Memo field (F12 to expand).

Enter a description of the physical character of the rock.

Example: zeolitized tuffaceous claystone
laminated kerogenous micrite
shale

Vertical Datum

Memo field (F12 to expand).

Enter the distance of occurrence of the specimen above a particular marker bed(s) identified in the Datum field. The collector determines the distance from an established stratotype or measures the distance using standard measuring systems corrected for dip of beds, etc.

Example: 5.5 meters below Eagle Crag Ash

Datum

Memo field (F12 to expand).

Enter the name of the marker bed or strata referenced in a stratigraphic section.

Example: Eagle Crag Ash
K-Spar Tuf
Member G Basalt

In situ/Float

Bureau controlled table (F5). You may not add to, delete, or modify terms in this table.

Note whether the specimen was found in its original stratigraphic context or was found as "float". Choose from the following options:

Anthill
Both
Float
In Situ
Reworked

As you type, the word will complete from an authority table of acceptable terms. Press F5 or click the down arrow to view and select terms from the table.

Anthill - indicates that the specimen was not recovered in situ and that its location has been secondarily influenced by the activities of ants. Usually only applied to small fossils.

Both - indicates that part of the original specimen had weathered out so was no longer in its original stratigraphic position so is considered float but parts of the specimen were still in situ thus permitting an accurate determination of its stratigraphic level.

Float - if the fossil is sitting on the ground surface and has been moved or transported from its primary sedimentary context so that it is not possible to determine its original stratigraphic level.

In Situ - a fossil is considered In Situ if it is still embedded in the original sediment in which it was buried.

Reworked - if the context of the fossil suggests it has been removed from its primary context and secondarily buried in a younger sediment.

Horizon

User-built, stacked table (F5, Ctrl-F5, F12).

Enter the particular fossiliferous level from which the material was collected. The biostratigraphic unit should follow the basic principles associated with the discipline. Use of intervals or other biozone concepts should be consistent with accepted terms for the biotic assemblage.

Example: Lower Red layer

As you type, the word will complete from an authority table of acceptable terms. Press the F5 key or click the down arrow icon to view and select terms from the table, or press F12 for an expanded field that allows you to enter terms from the table.

Users with the appropriate security rights can add, delete, or modify terms in the table. To add an entry to the table, right-click in the field and select Browse Authority Table or press Ctrl-F5, then click Add Term. After entering the term, click Save Change, then click Select to enter the term in the field. The expanded field (F12) also allows users to add, delete, and edit.

You can make multiple entries from the expanded field (F12). After entering the first term, click the Add link or press the down arrow on the keyboard. An additional field appears below the first entry for you to select another term from the table. When saved, a double dash -- separates entries.

Click Delete or press Ctrl-Delete to remove unwanted entries.

Taphonomy

Memo field (F12 to expand).

Enter information characterizing the accumulation and sedimentary context of the material, if available. Use unit-specific terms, or observations specific to the discipline. For example, for vertebrate fossils this may include bone modification observations such as breakage, cracking, abrasion/polish, or surface marks.

❖*Period/System*

User-built table (F5, Ctrl-F5). The program includes a table. The program will enter "Not Provided" if you do not complete this field.

Enter the period or system assigned to the material. Do not use modifiers such as "lower" or "late."

Example: Cretaceous
Anthropogene

As you type, the word will complete from an authority table of acceptable terms. Press the F5 key or click the down arrow icon to view and select terms from the table.

Users with the appropriate security rights can add, delete, or modify terms in the table. To add an entry to the table, right-click in the field and select Browse Authority Table or press Ctrl-F5, then click Add Term. After entering the term, click Save Change, then click Select to enter the term in the field.

Press Ctrl-Delete to remove unwanted entries.

Epoch/Series

User-built table (F5, Ctrl-F5). The program includes a table.

Enter the epoch or rock series, or other assignation. This entry will differ depending on the system used in the area. This hierarchical level is lower than period/system.

Example: Eocene
Lias

As you type, the word will complete from an authority table of acceptable terms. Press the F5 key or click the down arrow icon to view and select terms from the table.

Users with the appropriate security rights can add, delete, or modify terms in the table. To add an entry to the table, right-click in the field and select Browse Authority Table or press Ctrl-F5, then click Add Term. After

entering the term, click Save Change, then click Select to enter the term in the field.

Press Ctrl-Delete to remove unwanted entries.

Age/Stage

User-built table (F5, Ctrl-F5). The program includes a table.

Enter the appropriate age or stage depending on the taxonomic affinities of the paleontological material. For example, for Tertiary mammals use the North American Land Mammal Age (NALMA) system and enter or choose the appropriate term, such as "Whitneyan." For marine invertebrates, choose from either European stages, such as "Albian," or use the newer North American terms, such as "Mancos."

As you type, the word will complete from an authority table of acceptable terms. Press the F5 key or click the down arrow icon to view and select terms from the table.

Users with the appropriate security rights can add, delete, or modify terms in the table. To add an entry to the table, right-click in the field and select Browse Authority Table or press Ctrl-F5, then click Add Term. After entering the term, click Save Change, then click Select to enter the term in the field.

Press Ctrl-Delete to remove unwanted entries.

Formation

User-built, stacked table (F5, Ctrl-F5, F12). The program will enter "Not Provided" if you do not complete this field.

Enter the basic lithostratigraphic unit (the geological formation) from which the specimens were removed. Use only terms acceptable and consistent with the North American Stratigraphic Code. Entries should have no reference to time or age.

For lithodemic units appropriate to intrusives, deformed, and metamorphic rocks, enter the lithodeme, not the suite or complex.

For pedostratigraphic units, enter the geosol.

For sedimentary units mapped primarily on the basis of discontinuities, enter the alloformation.

Example: Rattlesnake

For NPS, formation data that appeared in Class 2 on the Registration page in previous versions of ANCS+ was moved during the conversion to this field. The word 'formation', if present, was removed during conversion.

As you type, the word will complete from an authority table of acceptable terms. Press the F5 key or click the down arrow icon to view and select terms from the table, or press F12 for an expanded field that allows you to enter terms from the table.

Users with the appropriate security rights can add, delete, or modify terms in the table. To add an entry to the table, right-click in the field and select Browse Authority Table or press Ctrl-F5, then click Add Term. After entering the term, click Save Change, then click Select to enter the term in the field. The expanded field (F12) also allows users to add, delete, and edit.

You can make multiple entries from the expanded field (F12). After entering the first term, click the Add link or press the down arrow on the keyboard. An additional field appears below the first entry for you to select another term from the table. When saved, a double dash -- separates entries.

Click Delete or press Ctrl-Delete to remove unwanted entries.

Member

User-built, stacked table (F5, Ctrl-F5, F12).

Enter the appropriate formal stratigraphic subdivision from which the material was recovered. This may take the form of a formal unit, such as the Turtle Cove Member. If the formation has no established subdivisions, use the informal terms in general acceptance. All member names include a geographic term and the word "member." Some contain an intervening lithologic term, such as the Laney Shale Member of the Green River Formation.

For lithodemic units appropriate to intrusives, deformed, and metamorphic rock, enter the informal subunit.

For sedimentary units mapped primarily on the basis of discontinuities, enter the allomember.

Example: Turtle Cove Allomember
Laney Shale Allomember

As you type, the word will complete from an authority table of acceptable terms. Press the F5 key or click the down arrow icon to view and select terms from the table, or press F12 for an expanded field that allows you to enter terms from the table.

Users with the appropriate security rights can add, delete, or modify terms in the table. To add an entry to the table, right-click in the field and select Browse Authority Table or press Ctrl-F5, then click Add Term. After entering the term, click Save Change, then click Select to enter the term in the field. The expanded field (F12) also allows users to add, delete, and edit.

You can make multiple entries from the expanded field (F12). After entering the first term, click the Add link or press the down arrow on the keyboard. An additional field appears below the first entry for you to select another term from the table. When saved, a double dash -- separates entries.

Click Delete or press Ctrl-Delete to remove unwanted entries.

Geo Unit

User-built, stacked table (F5, Ctrl-F5, F12).

Enter the bed (if sedimentary) or flow (if volcanic flow rock). Although beds are considered formal units, you may enter informal unit subdivisions, such as the Sandwich Layers.

Example: Trilobite Bed
Lower Interlake Beds

As you type, the word will complete from an authority table of acceptable terms. Press the F5 key or click the down arrow icon to view and select terms from the table, or press F12 for an expanded field that allows you to enter terms from the table.

Users with the appropriate security rights can add, delete, or modify terms in the table. To add an entry to the table, right-click in the field and select Browse Authority Table or press Ctrl-F5, then click Add Term. After entering the term, click Save Change, then click Select to enter the term in the field. The expanded field (F12) also allows users to add, delete, and edit.

You can make multiple entries from the expanded field (F12). After entering the first term, click the Add link or press the down arrow on the keyboard. An additional field appears below the first entry for you to select another term from the table. When saved, a double dash -- separates entries.

Click Delete or press Ctrl-Delete to remove unwanted entries.

Type Specimen

User-built, stacked table (F5, Ctrl-F5, F12).

If appropriate, enter the type for the specimen, or "Voucher" if the specimen is a voucher specimen. This indicates that the specimen has been recognized in publication as a "type specimen." A type specimen is the individual specimen on which a Latin name and scientific description are based. Recognizing types is the job of the specialist. Look for the word "Type" on the label or on a separate annotation label fixed to the specimen.

As you type, the word will complete from an authority table of acceptable terms. Press the F5 key or click the down arrow icon to view and select terms from the table, or press F12 for an expanded field that allows you to enter terms from the table.

Users with the appropriate security rights can add, delete, or modify terms in the table. To add an entry to the table, right-click in the field and select Browse Authority Table or press Ctrl-F5, then click Add Term. After entering the term, click Save Change, then click Select to enter the term in the field. The expanded field (F12) also allows users to add, delete, and edit.

You can make multiple entries from the expanded field (F12). After entering the first term, click the Add link or press the down arrow on the keyboard. An additional field appears below the first entry for you to select another term from the table. When saved, a double dash -- separates entries.

Click Delete or press Ctrl-Delete to remove unwanted entries.

Figured Specimen/Object

Y/N logical field that links to the Publication Citation supplemental record.

Select "Y" (Yes) if the specimen/object is illustrated in a publication.

After "Y" (Yes) is entered, press the tab key to activate the Figured Specimen link to the Publication Citation supplemental record. New records must be saved before supplemental records can be accessed. Click the link to access and complete the supplemental record to note publications in which the object is illustrated.

Refer to Section XVIII of Chapter 3 for information on the Publication Citation supplemental record.

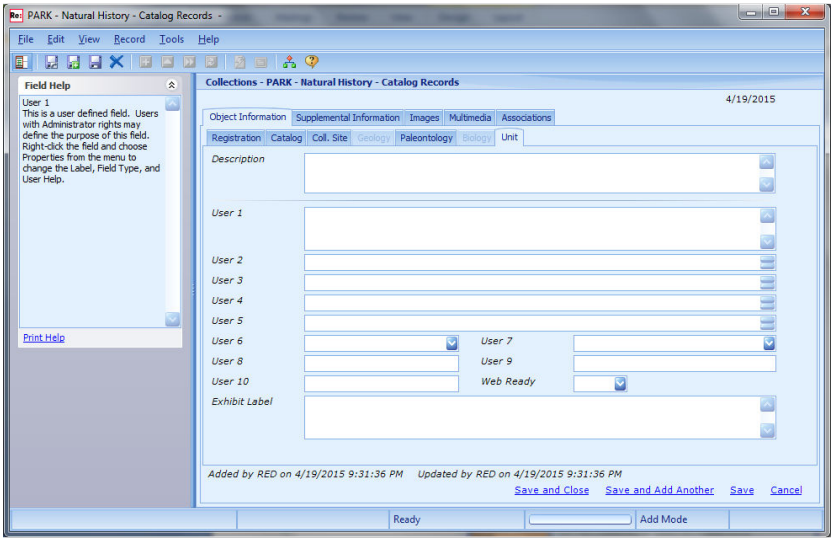
You have completed the paleontology screen. Click on the Unit tab or press Ctrl-N to go to the unit screen.

5. *How do I complete the data fields on the unit screen?*

There are ten user-defined fields on the unit screen. Enter data in these fields that are unit-specific and that do not fit on the other four screens.

Note: All disciplines in the NH directory share the ten unit fields. You may want, or need, to reserve some user fields for biology and/or geology records.

In addition, there are two fields used by the Web Catalog. Refer to Appendix X in this manual for further information about the Web Catalog.



If you are authorized, you may modify each field by right clicking and selecting Properties. In the Field Properties screen, click the modify button, press F10 or select Modify This Record on the Edit menu. Then select the Default Label/Help tab. Change the label and field type as needed.

Example: Field Label = Weather
Field Type = Memo

Refer to Chapter 1, System Basics, for additional information on defining user fields and a description of field types.

Web Ready

Y/N logical field

Select "Y" (Yes) if the catalog record is ready for publication on the Web Catalog.

Records published on the Web Catalog should be accurate and complete. Check the records for typographical errors. Use the Exhibit Label field to include enough detail to allow the general public to understand the nature and significance of the object. A high-quality image of the object is recommended.

Do not mark as Web Ready any records for deaccessioned objects, returned loans, or draft status records. Do not mark as Web Ready any records for objects on loan from non-bureau sources. Do not mark as Web Ready any records for human remains, or NAGPRA materials.

The Web Catalog will publish only Web Ready records. You can update the Web Ready field for groups of records by selecting the records and using the Modify All option on the Edit menu.

The Web catalog does not display sensitive data such as object location, site of provenience, or value.

Exhibit Label

Memo field (F12 to expand, or right click and zoom).

Use the Build Exhibit Label function on the Edit menu to select fields to include in the Exhibit Label field. Then use Modify All Records on the Edit menu, and enter {exhibit label} in the Exhibit Label field to automatically complete this field for groups of records. See Appendix X: Web Module for information on the Build Exhibit Label function.

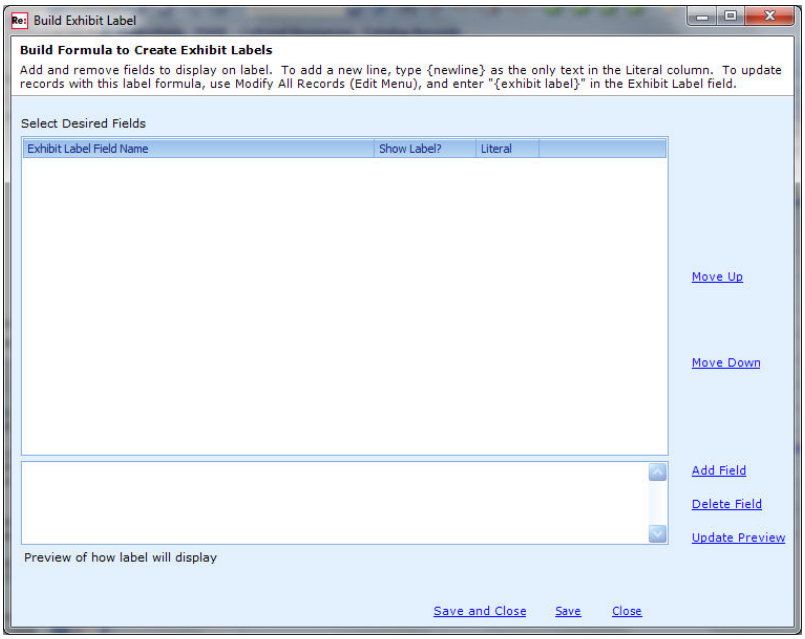
You may also complete this field manually. Enter a description of the object suitable for public display in a physical or web-based exhibit. You may also paste in label text from other sources such as on-line exhibits or electronic documents.

6. *How do I use the Build Exhibit Label function?*

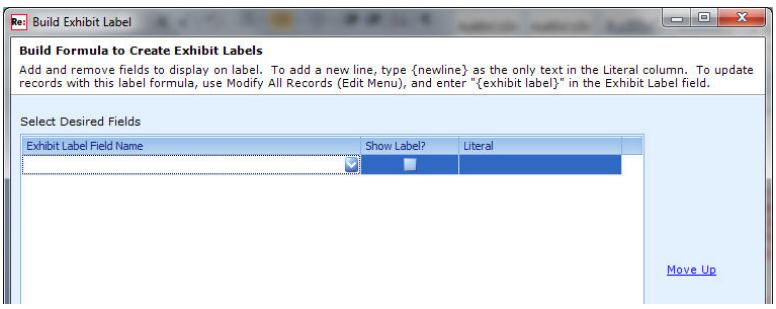
The Build Exhibit Label function lets you select fields to include in the Exhibit Label field on the Unit tab of the catalog record. You can then use Modify All Records to automatically complete the Exhibit Label field for groups of catalog records. It is only available for Cultural Resources and Natural History catalog records.

To use the Build Exhibit Label function:

- From the Catalog Record screen in either your CR or NH directory, go to the Edit menu and select Build Exhibit Label.



- Click Add Field at the lower right to add a field selection row to the desired field list.



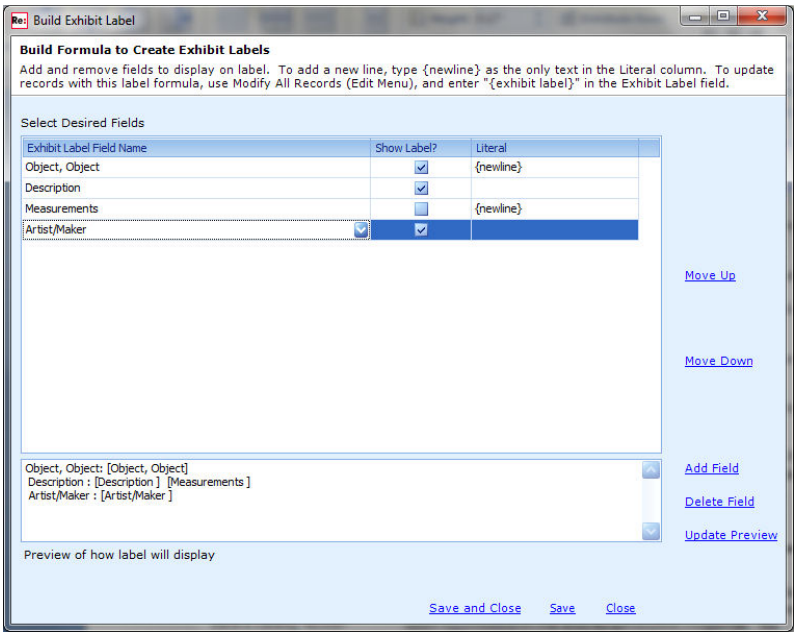
- Click the pull-down in that row to select the field to include in the exhibit label.

- If you wish to show the field label for this field, check the "Show Label?" box.

- To include a hard return after a field, enter {newline} in the Literal column for that field. You can also use the Literal column to add punctuation between fields.

- Continue using Add Field and making your selections until you have all the desired fields in the list.

  Note that the box at the bottom of this screen shows how the label will display in the Exhibit Label field.



- To remove a field from the list, highlight the row and click Delete Field

- To change the order of the fields, highlight a row in the list and use the Move Up and Move Down links.

- Click Update Preview to refresh the layout preview whenever you have made changes to the field list.

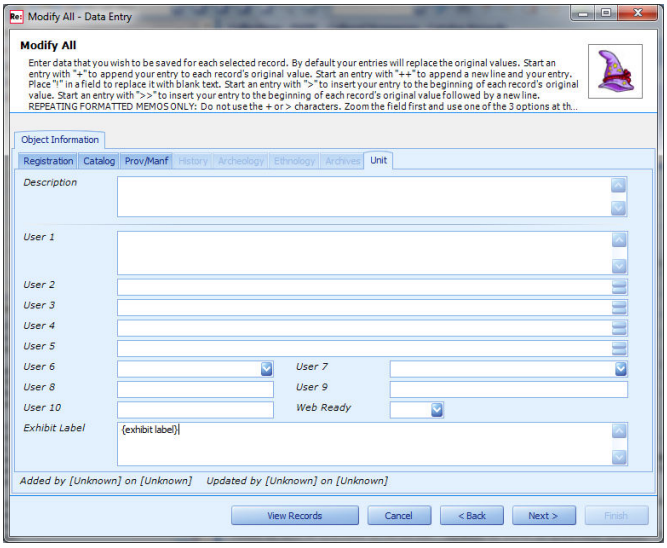
- When you have finished selecting and arranging the fields for the exhibit label, click Save and Close.

You are now ready to automatically update the Exhibit Label field on your selected catalog records as follows:

- Select a subset of your records by either activating a tag set, filter or highlighting multiple records in the List Pane.

- From the Edit menu, select Modify All Records.
  - In the Modify All wizard, click Next

- Select whether to update records of a specific discipline or all disciplines. Click Next.
- Select the Unit tab and enter {exhibit label} in the Exhibit Label field. Note: you must include the brackets.



- Click Next
- Verify that it will be updating the Exhibit Label field with the indicated value and click Finish.

All the selected records will now have the Exhibit Label field completed with the fields you selected in the Build Exhibit Label function.

You can change the fields in the Build Exhibit Label function at any time and update other records or the same records using the above steps.

D. ITIS

1. *What is ITIS?*

The Integrated Taxonomic Information System (ITIS) is a taxonomic database developed and maintained at the National Museum of Natural History, Smithsonian Institution. It was established because the White House Subcommittee on Biodiversity and Ecosystem Dynamics identified systematics as a research priority that is fundamental to ecosystem management and biodiversity conservation.

ITIS is the result of a partnership of Federal agencies formed to satisfy their mutual needs for scientifically credible taxonomic information. The goal is to create an easily accessible database with reliable information on species names and their hierarchical classification. The database is reviewed periodically to ensure high quality with valid classifications, revisions, and additions of newly described species.

ITIS does not intend to serve as a forum for cutting-edge taxonomic classifications. Rather, ITIS is meant to serve as a standard to enable the comparison of biodiversity datasets, and therefore aims to incorporate classifications that have gained broad acceptance in the taxonomic literature and by professionals who work with the taxa concerned.

For more information visit the ITIS website http://www.itis.gov.

2. *Why is ITIS used?*

Taxonomy is a dynamic discipline and while different taxonomists may propose different interpretations on the relationships of organisms and the names applied, there is a need for a consistent usage of names both within a database and between different databases. The ITIS database provides this standardization for taxonomy.

The taxonomy and classification in ITIS have been adopted by NPSpecies as its standard. In order to ensure consistency between different databases, ITIS has also been incorporated as the taxonomic standard for **ICMS**.

3. *How does ITIS work?*

ITIS assigns a number, called the Taxonomic Serial Number (TSN), to each species name. The TSN is used to link each species name to its hierarchical classification.

4. *Is ITIS complete?*

Many, but not all, taxonomic groups have been completed. To view the status for a specific group visit http://www.itis.gov/status.html.

5. *What should I do if ITIS hasn't completed the group I am cataloging?*

The fields that are automatically filled in using ITIS can also be filled in manually. See individual field descriptions for instructions. If you are cataloging specimens that are not covered by ITIS, you should manually enter the data. You can use functions such as Modify All, Carry Over, Defaults, and Quick Entry to speed the data entry process.

6. *How will ITIS be updated?*

Updates to ITIS will be included in updates to **ICMS**.

7. *Why are some names listed as "valid" or "accepted" and some terms listed as "invalid" or "not accepted"?*

The status of a name is determined by the taxonomic judgment of an author and/or an ITIS steward. The current standing may be valid/accepted or invalid/not accepted.

- valid or accepted –This means the name is broadly used in the scientific community and recommended by ITIS. When there is no consensus (e.g., multiple classifications exist), ITIS and its stewards have made a choice as to which name to use. Valid is used in the Animalia and Monera kingdoms; accepted is used in the Plantae and Fungi kingdoms.

- invalid or not accepted –This means the name is a synonym, and not the currently accepted name. Invalid is used in the Animalia and Monera kingdoms; not accepted is used in the Plantae and Fungi kingdoms.

8. *How can I find the "valid" or "accepted" name?*

Go to the ITIS web site, currently http://www.itis.gov. Search for the invalid or not accepted name. The web page for the invalid or not accepted name will included the valid or accepted name.

9. *Why are some of the Taxonomic Serial Numbers (TSN) negative?*

ITIS was designed for all living biological organisms; it does not now, and likely will not in the future, include extinct biological organisms. In order to make ITIS useable for paleontology specimens, extinct organisms need to be included. To ensure there is no overlap between TSNs for paleontology terms and TSNs already in ITIS, Bureau assigns negative numbers to the paleontology terms.

10. *How do Paleontology terms get into ITIS?*

For the NPS, field paleontologists submit a list of terms to the Park Museum Management Program. The terms are reviewed by the Senior Natural History Curator, and NPS appends the terms to ITIS following the ITIS data standards. Other bureaus may establish procedures for submitting and reviewing additional terms as needed.

E. Find Specimen

1. *What is Find Specimen?*

The Find Specimen link next to the TSN field lets you search for and select the name of the specimen you are cataloging. After selecting a term from the Find Specimen list, the classification and scientific name for the specimen will be automatically filled in by the program. This makes entering catalog records faster and more accurate. Find Specimen uses the Integrated Taxonomic Information System (ITIS) as its authority of accepted terms, with additional terms from Bureau paleontology collections.

Note: The Bureau assigns negative TSNs to extinct biological organisms from Bureau collections. Refer to Section D above for information on ITIS.

2. *Who can use Find Specimen?*

Anyone performing data entry tasks in natural history catalog records can use Find Specimen.

3. *Which fields will be updated?*

Selecting a valid or accepted term in Find Specimen will update these fields:

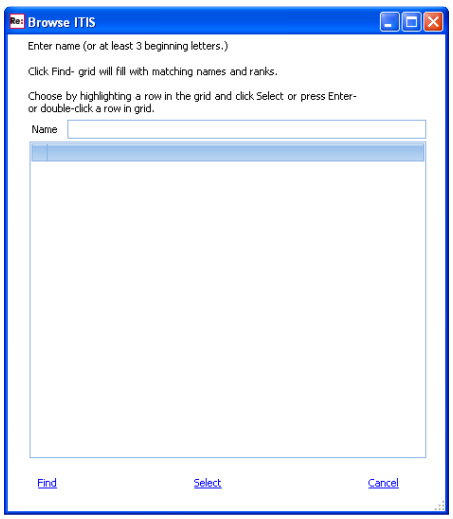
Kingdom
Phylum/Division
Class
Order
Family
Scientific Name
Common Name
TSN
Linnaean Taxon.

Note: If you are updating an existing record that has data in these fields, the data will be changed if there is data available for them in the ITIS authority tables.

4. *How do I use Find Specimen?*

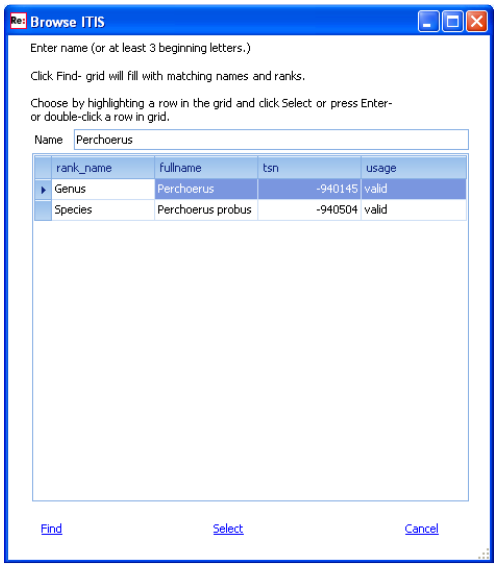
To use Find Specimen, in Add, Modify or Copy mode on a record:

- Enter PALEONTOLOGY in Class 1
- Click the Find Specimen link. The Browse ITIS window will open.



- In the Name field, enter all or part of the first term for the specimen, such as the Genus. You must enter at least 3 letters of the term.

- Click the Find link at the bottom left. The grid will display matching terms from the ITIS authority table. The grid shows the rank, full name, TSN, and usage (whether the term is valid, invalid, accepted, or not accepted). For example, enter 'Perchoerus' in the Name field. (Note that the TSN for paleontological entries is usually a negative number.)



- Select a term from the list, and click the Select link at the bottom. The Browse ITIS window will close, and the catalog record will be updated.

Notes: If you select a term that is valid or accepted, all the fields from Kingdom to Scientific Name, and possibly Common Name, will be completed automatically. If you select a term that is invalid or not accepted, only some of the fields will be completed automatically.

If you select a term with the rank of Family or higher, the Scientific Name will not be completed. You must enter the Scientific Name manually in order to save the catalog record.

Selecting a term of a specific taxonomic rank (Family, Genus, Species, etc.) will update only the fields for that rank and higher on the catalog record.

See Section D for information on valid or accepted and invalid or not accepted terms.

F. Saving the Record

1. *What is the Track Changes screen that appears when I save a catalog record?*

When you save a catalog record, the program will prompt you for information to track location, condition, catalog notes and scientific name for the specimen. The system will create supplemental records from the information you provide. The supplemental records allow you to see on one screen all the changes in location, condition, scientific name and cataloging activity for the specimen.

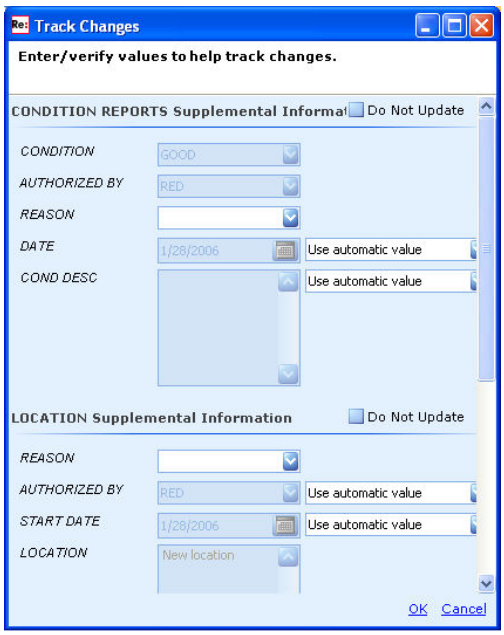
You may choose not to create the supplementals and still save the record. This saves a small amount of time when entering or modifying records. However, the benefits of having location, condition, scientific name and catalog activity histories outweigh the time it takes to create them. Taking advantage of this feature in the program is highly recommended.

When creating a supplemental for tracking, you have the choice of accepting the default entries on some fields in the supplemental, or manually updating the supplemental fields.

To not create a supplemental, click the Do Not Update box on the supplementals you do not wish to create.

Click OK to save the entries from the Track Changes screen in the supplemental records.

Do not click the Cancel link here or you will cancel the entire record, not just the supplemental update.



2. *How do I complete the condition tracking supplemental?*

If you add or change a condition in the Condition or Condition Description fields, the program will include the Condition Reports supplemental in the Track Changes screen when you save the record. Complete the Condition Reason field manually. The Condition Reason field is a user-built table (F5, Ctrl-F5). Enter the reason for the condition.

Example: Broken and mended
Conservation

As you type, the word will complete from an authority table of acceptable terms. Press the F5 key or click the down arrow icon to view and select terms from the table.

Users with the appropriate security rights can add, delete, or modify terms in the table. To add an entry to the table, right-click in the field and select Browse Authority Table or press Ctrl-F5, then click Add Term. After entering the term, click Save Change, then click Select to enter the term in the field.

Press Ctrl-Delete to remove unwanted entries.

You can also change the Date and/or Condition Description if needed. These fields are set to use automatic values. To change the entries, select "Manually update value" from the pull down menu next to the field.

Note: The entry from the Condition Description field appears on the update screen. If you have no entry in the Condition Description field, the field on the prompt screen will be blank. You can enter a condition description on the prompt screen, but it will not transfer back to the catalog record.

Refer to Section V of Chapter 3 for additional information on the Condition Reports supplemental record.

3. *How do I complete the location tracking supplemental?*

If you add or change a location, the program will include the location supplemental in the Track Changes screen when you save a record. Complete the Location Reason field manually. The Location Reason field is a user-built table (F5, Ctrl-F5). Enter the reason for the location.

Example: Storage
Summer Exhibit

As you type, the word will complete from an authority table of acceptable terms. Press the F5 key or click the down arrow icon to view and select terms from the table.

Users with the appropriate security rights can add, delete, or modify terms in the table. To add an entry to the table, right-click in the field and select Browse Authority Table or press Ctrl-F5, then click Add Term. After entering the term, click Save Change, then click Select to enter the term in the field.

Press Ctrl-Delete to remove unwanted entries.

Note: For permanent locations, enter "Permanent Location" in the Location Reason field. This entry will allow you to print an Object Temporary Removal Slip (Form 10-97) to document removal from a permanent location.

You can also change the Authorized by and Start Date if needed. These fields are set to use automatic values. To change the entries, select "Manually update value" from the pull down menu next to the field.

Refer to Section XII of Chapter 3 for additional information on the Location supplemental record.

4. *How do I complete the catalog notes tracking supplemental?*

If you add or change a catalog record, the program will include the Catalog Notes supplemental in the Track Changes screen when you save the record. All entries are autofilled from the previous data entry session. To change the entries for any of the fields, select "Manually update value" from the pull down menu next to the field.

The Cataloger field is a user-built table (F5, Ctrl-F5). Enter the last name of the cataloger.

As you type, the word will complete from an authority table of acceptable terms. Press the F5 key or click the down arrow icon to view and select terms from the table.

Users with the appropriate security rights can add, delete, or modify terms in the table. To add an entry to the table, right-click in the field and select Browse Authority Table or press Ctrl-F5, then click Add Term. After entering the term, click Save Change, then click Select to enter the term in the field.

Press Ctrl-Delete to remove unwanted entries.

Note: The name you enter at the prompt does not change the name in the Cataloger field on the record.

The Level field is a Bureau controlled table (F5). You may not add to, delete, or modify terms in this table.

Choose from the entries in the table as defined below:

Catalog - you have completed all fields for which there is information.

Minor Change- you have made minor changes, such as spelling corrections or location changes.

Recatalog - you have made substantial changes to the data, such as changes in date, classification, and object name.

Registration - you have completed only the registration screen and mandatory fields on the other 3 screens.

As you type, the word will complete from an authority table of acceptable terms. Press the F5 key or click the down arrow icon to view and select terms from the table.

The Notes field is a Memo field (F12 to expand). You may also want to enter notes on the cataloging activity at this time.

Refer to Section III of Chapter 3 for additional information on the Catalog Notes supplemental record.

5. *How do I complete the scientific name tracking supplemental?*

If you add or change the Scientific Name, Identified By, or Identified Date fields, the program will include the Scientific Name supplemental in the Track Changes screen when you save the record.

Enter a reason for the change in the Reason field.

Example: annotation
misidentification
re-verification of the name by a different identifier

Refer to Section XXII of Chapter 3 for additional information on the Scientific Name supplemental record.

G. Supplemental Records

1. *How do I complete the supplemental records that are associated with a paleontology record?*

Refer to Chapter 3, Supplemental Records, for instructions on completing the supplemental records. Use these records to enter data on appraisals, component parts, images, preservation work, provenance, related databases, research notes, significance, and publication citations.

The program creates the supplemental records for catalog notes, condition reports, location, object status, and scientific name when you save a record. See Section F above. The program will prompt you for information, such as the level of cataloging, or the reason for the location. When you complete the information, the program saves it as a supplemental record.

Note: The program creates the Object Status supplemental record, but the program does not prompt you for information to complete the record.

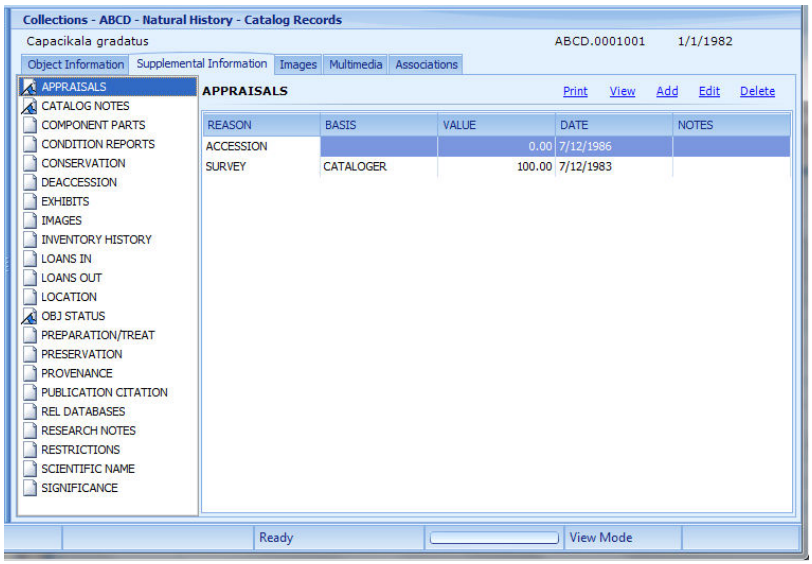
2. *What supplemental records are created automatically by the program?*

The program automatically creates supplemental records for deaccessions, exhibits, restrictions, loans in, loans out, inventory history and preparation/treatment. Each of these supplemental records has a corresponding associated module. When you create a record in the associated module, such as an outgoing loan record, you can attach catalog records to it. The program will then automatically create supplemental records for each attached catalog record or in the case of the inventory history supplemental, when a catalog record is included in an inventory sample generated by the inventory module.

Refer to Chapter 4, Associated Modules, for instructions on completing records in the associated modules. Refer to Appendix I: AIP for instructions on generating and completing an inventory.

3. *How do I know whether a supplemental record contains information?*

The supplemental records are located on the Supplemental Information tab on the Object Catalog Record. When you look at the list of supplemental records, a flag icon marks the records that contain information.



H. Printing the Record

Refer to Chapter 5, Printing and Reports, for additional information.

1. *How do I print a catalog record?*

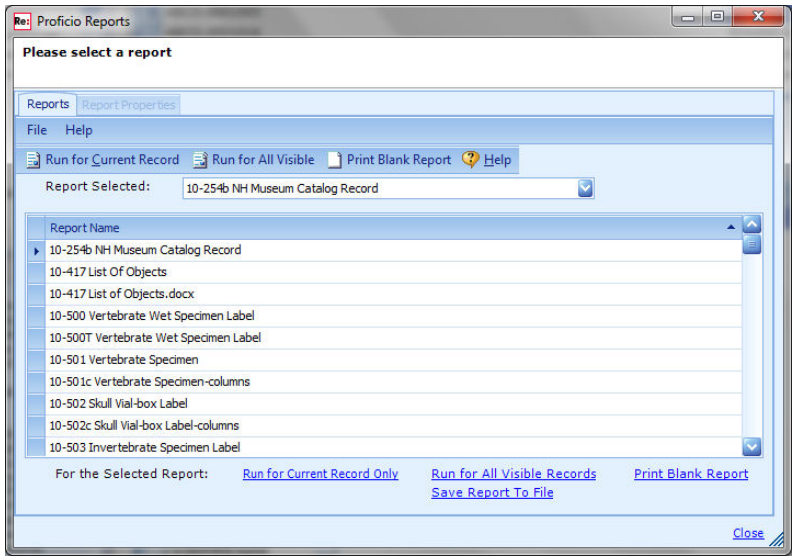
There are three ways to print the information in a catalog record:

NPS Form 10-254B (selected fields)
or
DOI NH Museum Catalog Record

The NPS Form 10-254B and the DOI NH Museum Catalog Record print on blank paper. The NPS Form 10-254B is the same as the preprinted Form 10-254B.

To access and print the NPS Form 10-254B or the DOI NH Museum Catalog Record, follow these steps in View Mode:

- click on the Proficio Reports icon on the button bar, *or*
- go to Record on the menu bar and choose Reports from the pull-down menu. Select Proficio Reports from the submenu.



- select 10-254b NH Museum Catalog Record or DOI NH Museum Catalog Record to print the natural history catalog record
- select either Run for Current Record Only or Run for All Visible Records. You can print one record or a group of records. Refer to Chapter 7 for creating groups of records.
- Click the Print button in the Preview window.

Full View

To print the record in Full View:

- click the Full View icon on the button bar
- choose to print the Current Record or All Visible Records,
- select whether to Show Pictures, Show Supplementals and/or Show Blank Fields by checking the appropriate boxes,
- click Select,
- click the Print button in the Full View window.

2. *Must I print a catalog record?*

No. Printing catalog records at the unit is optional.

For NPS, you must submit electronic records on a fiscal year basis to the NPS National Catalog in Harpers Ferry, West Virginia. National Catalog staff will print an archival copy of the 10-254B for storage there. Upon your request, the National Catalog staff will print paper copies of 10-254Bs for your park.

I. Mass Taxonomy Update

1. *What is Mass Taxonomy Update?*

Mass Taxonomy Update lets you quickly update the classification and scientific name of specimens in your Natural History catalog. The scientific name and classification assigned to specimens may change over time as more precise identifications are made for plants and animals. Mass Taxonomy Update uses the Integrated Taxonomic Information System (ITIS) as its authority of accepted terms, with additional terms from Bureau paleontology collections. ITIS is updated frequently, and will be updated periodically in **ICMS** to include the most up-to-date terms. See Section D for information on ITIS.

2. *Who can use Mass Taxonomy Update?*

Mass Taxonomy Update is available only to users with Administrator rights. Refer to Section VI of Chapter 9 for information on User Security.

Note: Mass Taxonomy Update is a powerful tool, similar to Modify All or Global Search & Replace. It lets you update many records very quickly. Take care to ensure you are updating only the records you intend to update by activating a Tag or Filter, before using Mass Taxonomy Update.

3. *How do I access Mass Taxonomy Update?*

Mass Taxonomy Update is available from the Edit menu. It is active only for Biology and Paleontology catalog records. You must activate a Tag Set or Filter, or select multiple records in the List Pane to use the Mass Taxonomy Update function.

4. *Which records will be updated?*

Mass Taxonomy Update will only change Biology and Paleontology catalog records. Geology records will not be changed by Mass Taxonomy Update.

Only Biology and Paleontology records where the existing data matches the ITIS authority tables will be changed. Biology and Paleontology records that can't be matched with valid or accepted ITIS terms won't be changed.

5. *Which fields will be updated?*

Mass Taxonomy Update will update these fields:

Kingdom
Phylum/Division
Class
Order
Family
Scientific Name
Common Name
TSN
Linnaean Taxon

These fields will only be changed if there is data available for them in the ITIS authority tables.

6. *Will previous Scientific Names be saved?*

Yes. Mass Taxonomy Update stores the previous Scientific Name data in the Scientific Name supplemental record.

7. *How does Mass Taxonomy Update change a record?*

Mass Taxonomy Update uses the following logic to match a catalog record with accepted terms in the ITIS authority tables.

- If the record includes a Taxonomic Serial Number in the TSN field, Mass Taxonomy Update will update the record based on that TSN. The TSN is a unique identifying number for every term in the ITIS authority tables.

- If the record does not include a TSN, Mass Taxonomy Update will compare the entry in the Scientific Name field to the ITIS authority tables. It will attempt to match the genus, species, and subspecific epithets (subspecies, variety, and forma), if available. If a match is found, and the matching record is valid or accepted in ITIS, the catalog record will be updated. If a match is found and the matching record is invalid or not accepted in ITIS, the catalog record will not be updated.

8. *How will I know which records were updated?*

Mass Taxonomy Update will display a report, showing the catalog number, scientific name, and TSN of every record in your Tag or Filter. The report shows which records were changed and which were not changed. You should print this report, or save it to a file, for future reference. See the instructions below for how to print or save the report.

9. *Why might a record not be updated?*

If Mass Taxonomy Update does not change a record you think should have been changed, it may be for one of the following reasons:

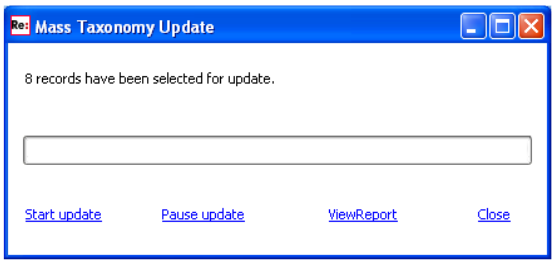
- A typographical error (misspelling) in the Scientific Name field prevented finding a match in the ITIS authority tables. Check the exact spelling of the scientific name. Compare it with the terms available under Find Specimen, or on the ITIS web site.
- The Scientific Name data was matched to the ITIS authority table, but the ITIS term is not valid or accepted. Only ITIS terms that are listed as "valid" or "accepted" will be updated by Mass Taxonomy Update. Use the Find Specimen link to search for the scientific name. Find Specimen will show whether the term is valid, invalid, accepted, or not accepted. See Section E above for information on using Find Specimen.
- The Scientific Name data was not entered in a standard format, which prevented finding a match in the ITIS authority tables. Standard formats for Scientific Name include:
    - Proper use of the Genus, Species, Subspecies, Variety, and Forma subfields, or
    - Data entered according to the instructions and examples in NPS *Museum Handbook*, Part II, Appendix H: Natural History, sections B.1.b and B.2.b. Generally, the first letter of the genus is always capitalized, and the specific epithet (species, subspecies, etc.) is all lower case. Species authors are entered with the first letter capitalized, according to strict conventions.
- The Scientific Name was entered in ALL CAPS, including the species author. Mass Taxonomy Update will translate ALL CAPS data into proper format (as described in the NPS *Museum Handbook*, Part II, Appendix H), which may render the species author as a possible trinomial term and prevent a match with the ITIS authority tables.

10. *How do I use Mass Taxonomy Update?*

Make a Backup of your Natural History directory before using Mass Taxonomy Update. See Chapter 9, Section II for information on making a backup.

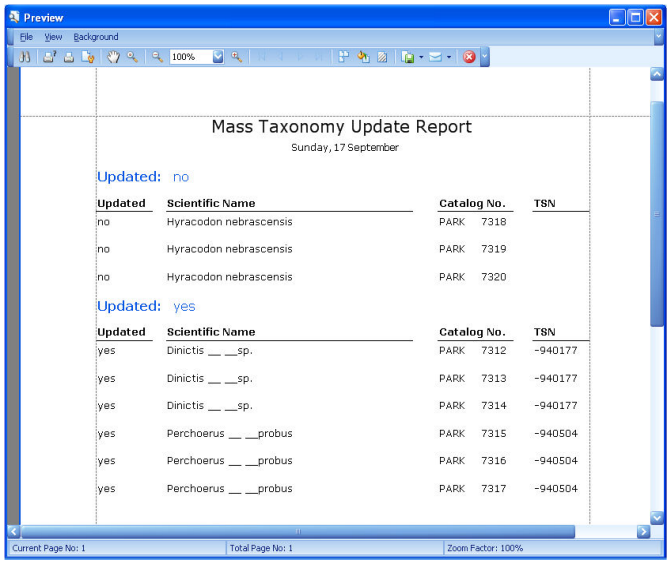
To use the Mass Taxonomy Update function:

- Select the records you want to update. You can activate a Tag Set or Filter, select multiple records in the List Pane using shift-click or ctrl-click, or use Quick Filter. See Chapter 7 for information on limiting your visible data.
- From the Edit menu, choose Mass Taxonomy Update. The Mass Taxonomy Update window will open. It will indicate the number of records selected for update.



- Click the Start Update link to start the update. **Note:** If you are updating a large number of records, you can click Pause Update to pause the update process.

- When the update is complete, click View Report to preview the update report.



- In the report Preview window, choose Print on the File menu to print the report (recommended). You can also choose Export Document on the File menu to save the report as a PDF format file (recommended). When finished, close the preview window by clicking the red X in the upper right corner.

- Close the Mass Taxonomy Update window by clicking Close.

- Click the Refresh button or select Refresh on the Edit menu to refresh the List Pane and view the updated catalog records.